

## Job Aid:

### How to Set Up a Master Blanket from Scratch

**This Job Aid shows a Basic Purchasing user how to:**

- Create a Master Blanket Purchase Order
- Submit PO for Approval and/or Send PO to Vendor


#### **Of Special Note:**

**You must be a Basic Purchasing or Department Access user with appropriate privileges to the organization that owns the migrated document to perform most of the steps outlined below.** Departments use three types of Vendor (Seller) Contracts, and this Job Aid will focus on the first two.

1. Master Blankets with one vendor (awarded contractor) and a catalog of line items specific to that vendor. These blankets, often referred to as “**single vendor based**,” are ideal for contracts where pricing is fixed and does not require a quote. This setup requires you to create a separate Master Blanket for each awarded contractor.)
2. Master Blankets with multiple vendors listed as distributors under one placeholder vendor. (These blankets, often referred to as “**multi-vendor based**,” can be “Solicitation Enabled” in order to support issuing Bids to get price quotes from the contractors, and then placing orders with the quote winner(s). This setup requires you to create one Master Blanket that would contain all the awarded contractors).
3. Punchout (G2B Blanket) – this catalog type requires OSD / Periscope involvement to establish as it is an integration with a vendor’s order management system and online shopping site

#### **Screenshot**

Welcome To **COMMBUYS Training**



COMMBUYS [Training] is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers

[Register](#)  
Register here to begin using COMMBUYS Training. Vendors, please read this [disclaimer](#) prior to registering.

[Complete Registration](#)  
Complete registration here to begin using COMMBUYS Training. Vendors, please read this [disclaimer](#) prior to completing registration.

[Open Bids](#)  
Browse open bid opportunities.

Login ID:

Password:

[Forgot your password?](#)

© 2014 Periscope Holdings, Inc. All Rights Reserved

1. Launch the COMMBUYS website by entering the URL <https://www.commbuys.com/bsol/> into the Browser

Enter your Login ID and Password

2. You will open to the COMMBUYS homepage Click Documents > POs > New

## Job Aid:

### How to Set Up a Master Blanket from Scratch

#### Screenshot



Create a New Purchase Order

Please select the method to create a new purchase order:

- ☒ Create a purchase order from scratch.
- ☐ Clone a purchase order from another purchase order.
- ☐ Create a purchase order from requisitions.
- ☐ Upload Contract.

PO Type of the New Purchase Order: **Blanket**

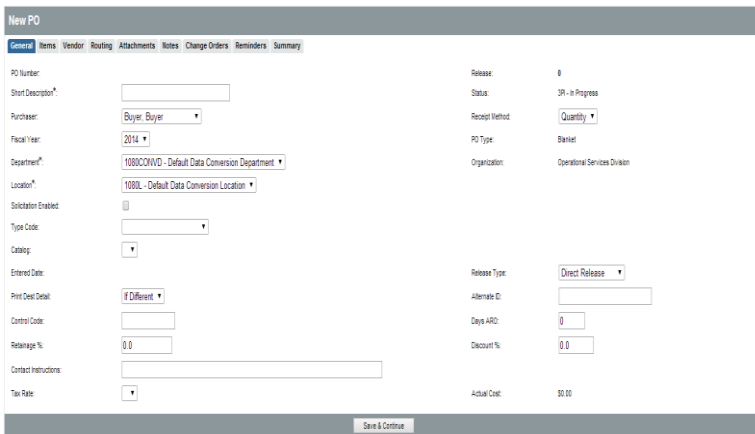
Continue Cancel & Exit

Copyright © 2014 Penscope Holdings, Inc. - All Rights Reserved

3. From the Create a New Purchase Order screen click the first radio button: Create a purchase order from scratch

From the drop down in the field PO Type of the New Purchase Order select Blanket.

Click Continue



New PO

General Items Vendor Routing Attachments Notes Change Orders Reminders Summary

PO Number:

Short Description:

Purchaser:

Fiscal Year:

Department:

Location:

Solicitation Enabled: ☐

Type Code:

Catalog:

Entered Date:

Print Desc Detail:

Control Code:

Release Type:

Alternate ID:

Days ARD:

Discount %:

Release:

Status:

Receipt Method:

PO Type:

Organization:

Retention %:

Contact Instructions:

Tax Rate:

Actual Cost:

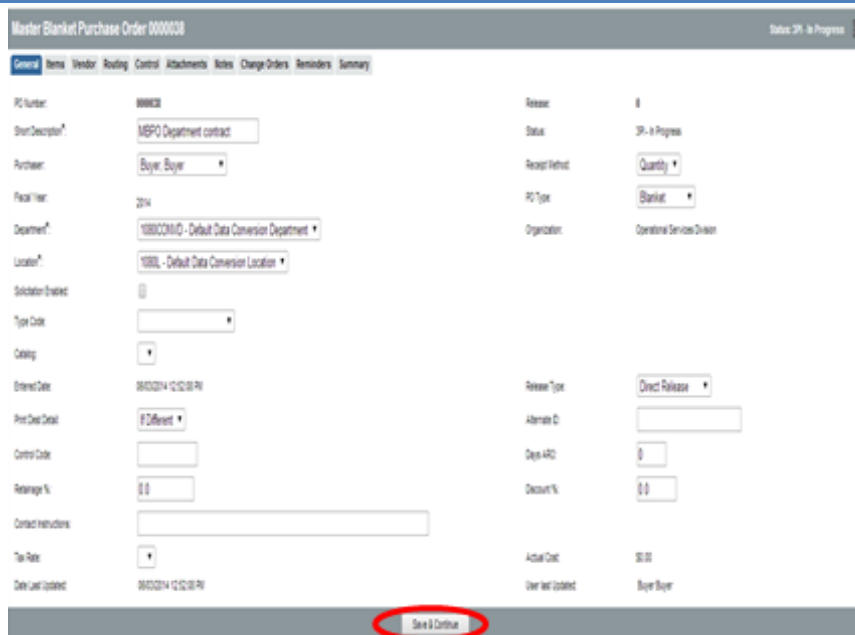
Save & Continue

4. This will generate a new Purchase Order and just like every COMMBUYS document you will need to complete the information on each tab. This job aid will walk through each tab.

## Job Aid:

### How to Set Up a Master Blanket from Scratch

#### Screenshot



5. The general tab contains all the high level, header information for the MBPO.

The only information that is required to complete is the Short Description. In this space you can enter your agency's selected contract numbering information, as well as a few key words about the contract for easy searching.

In the Type Code drop down select:

- "Non-Statewide / Limited User Contract" for departmental contracts.
- "Statewide Contract" for designated and OSD-issued statewide contracts. Note that statewide contracts are subject to policy considerations outlined in the [OSD COMMBUYS Policy](#) document.

For a single vendor blanket with specific pricing for a single vendor, you may select "Direct Release" if you would like the order (PO) to go directly to the vendor once the associated requisition is approved, or "Standard Release" if you would like to purchaser listed on the blanket to be the person releasing all orders (POs) to the vendors on the blanket after the approvals have been completed.

If the blanket will serve as a multi-vendor contract used for conducting Bids to get pricing for specific orders, be sure to select Solicitation-Enabled and instruct users to create Solicitation Enabled release requisitions when ordering from this contract. Distributor-based blankets require "Standard Release" for release type.

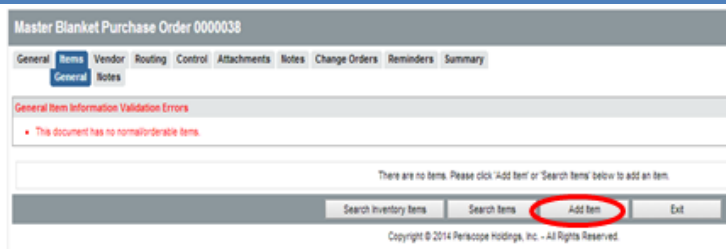
In some cases, departments may choose not to check off "Solicitation Enabled" on a distributor blanket. One example of such a contract is a true distributor situation, where all the vendors are selling the same products at the same pricing.

Click Save & Continue

## Job Aid:

### How to Set Up a Master Blanket from Scratch

#### Screenshot



6. Next click on the Items tab

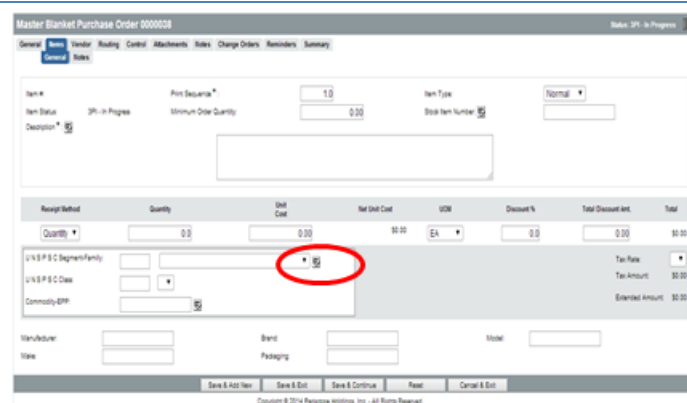
The item information section is used to define specific products or services, their UNSPSC codes and pricing information. Blankets of all types, catalog-based and distributor-based, are required to have at least one “item” in order to function.

Click Save & Continue

In a single vendor PO, the item information section is used to define specific products or services, their UNSPSC codes and pricing information. If pricing varies based on an item attribute, create separate items with their distinct pricing.

If you need users to be able to enter quoted prices, leave price blank and instruct them to enter pricing and add to the description on their release requisitions so that the vendor knows what they are ordering.

If a multi-vendor catalog, go to next step



7. Enter Item Description ,Quantity, Unit Cost

Choose a UOM (Unit of Measure) from drop down

Use the eyeglass icon to open a pop up UNSPSC search and select applicable UNSPSC Code(s) \*this can be a bit of challenge and we recommend selecting the most applicable code for the service/item, as there might be multiple related options.

If this is a multi-vendor blanket, the Description should be specific enough to determine what you / the purchaser are asking the vendor to provide quotes on and it is recommended that it

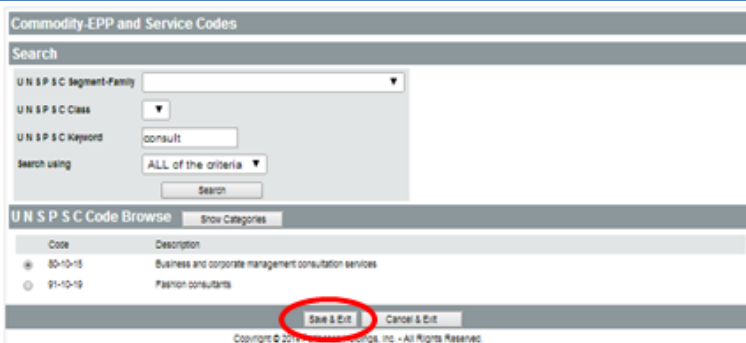
## Job Aid:

### How to Set Up a Master Blanket from Scratch

#### Screenshot

indicate that users should create a Solicitation Enabled requisition when ordering this item.

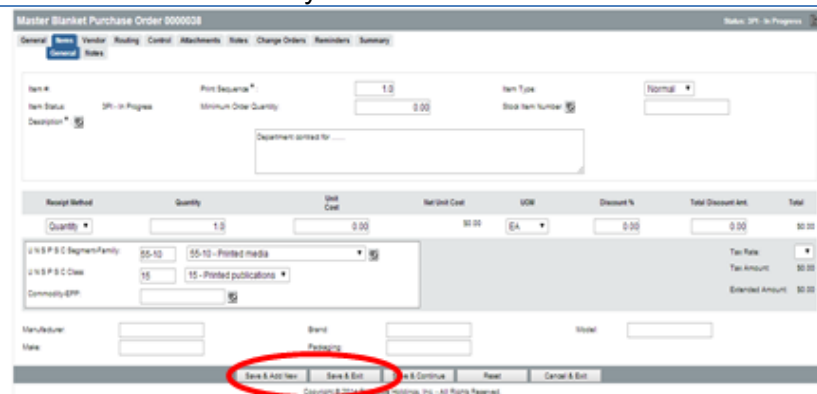
Users ordering this item will have the ability to append text to the Description on their Solicitation Enabled Release Requisitions.



8. Use the pop-up window to search for UNSPSC codes

- Enter keyword or select family segment
- Select radio button for best code

Click Save & Exit once you have selected the best code



9. Once you done entering information for the item/service click either Save & Exit or Save & Add More to enter more line items for the contract.

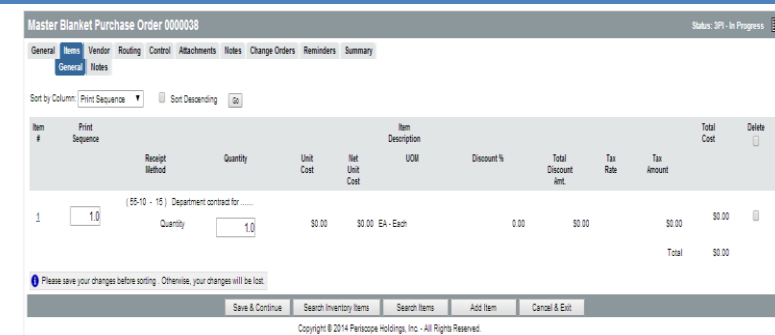
Finalize the item by adding the 4-digit Commodity-EPP extension. The commodity code is incomplete unless the Commodity-EPP field is populated.

\*If you want to select more UNSPSC codes for the MBPO, you can do that by creating multiple items

## Job Aid:

### How to Set Up a Master Blanket from Scratch

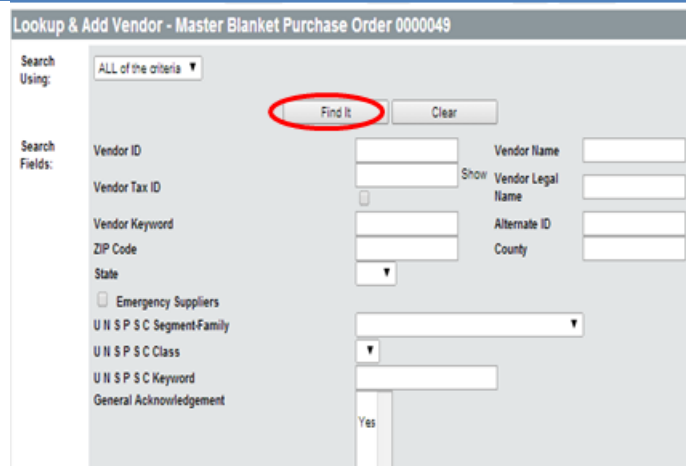
#### Screenshot



10. The layout shown is how COMMBUYS displays items and services (including those who have not logged in). To edit an item you have already entered, click the hyperlinked item number on the left side of the screen.



11. Click the Vendor Tab  
Click the Look Up & Add Vendor button



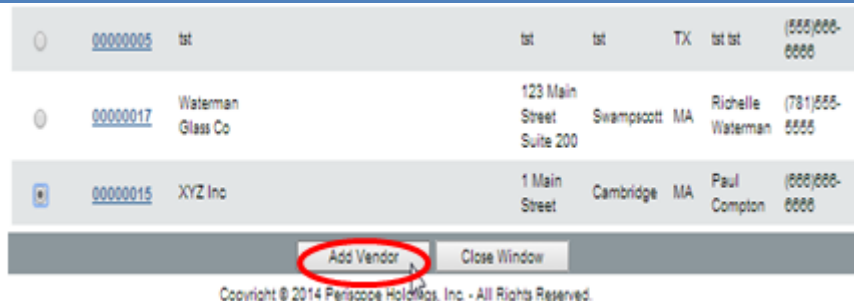
12. Enter your Vendor Search criteria if this is MBPO is the only vendor on the contract. Click Find It

\*If there are multiple Vendors associated with this departmental contract you will need to select Conversion Vendor (COMMBUYS Vendor ID 99000000) here. The Conversion Vendor acts as an overall placeholder for the contract and allows you to enter all the awarded contractors as distributors.

## Job Aid:

### How to Set Up a Master Blanket from Scratch

#### Screenshot

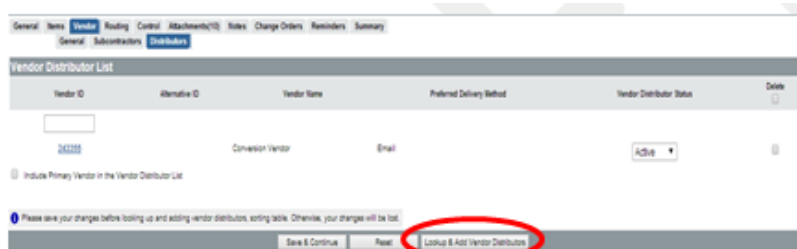


Vendor ID	Vendor Name	Address	City	State	Contact	Phone
00000005	tst		tst	TX	tst	(555)666-6666
00000017	Waterman Glass Co	123 Main Street Suite 200	Swampscott	MA	Richelle Waterman	(781)555-5555
00000015	XYZ Inc	1 Main Street	Cambridge	MA	Paul Compton	(666)666-6666

Copyright © 2014 Penscope Holdings, Inc. - All Rights Reserved.

13. Click the radio button for the desired Vendor. If you do not see the vendor you are looking for, try searching again or contact the vendor to see whether they are registered. The vendor must register with COMMBUYS in order to be added to a blanket.

Then click the Add Vendor button



General Items Vendor Routing Control Attachments(?) Notes Change Orders Reminders Summary

Vendor Distributor List

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Distributor Status	Delete
00000005		Conversion Vendor	Email	Active	

☐ Include Primary Vendor in the Vendor Distributor List

Please save your changes before looking up and adding vendor distributors, sorting table. Otherwise, your changes will be lost.

Copyright © 2014 Penscope Holdings, Inc. - All Rights Reserved.

14. For multi-vendor MBPOs click on the Distributor sub tab

Click Lookup & Add Vendor Distributors



<input type="checkbox"/>	214274	Tellus Institute	11 Arlington Street	Boston	MA	James Goldstein	6172665400
<input type="checkbox"/>	00000009	Third Test	1 Main St	Boston	MA	James Tester	(666)666-6666
<input type="checkbox"/>	00000005	tst	tst	tst	TX	tst	(555)666-6666
<input type="checkbox"/>	00000017	Waterman Glass Co	123 Main Street Suite 200	Swampscott	MA	Richelle Waterman	(781)555-5555
<input type="checkbox"/>	00000015	XYZ Inc	1 Main Street	Cambridge	MA	Paul Compton	(666)666-6666

15. If this is a distributor-based blanket, another Vendor Search pop up window will display

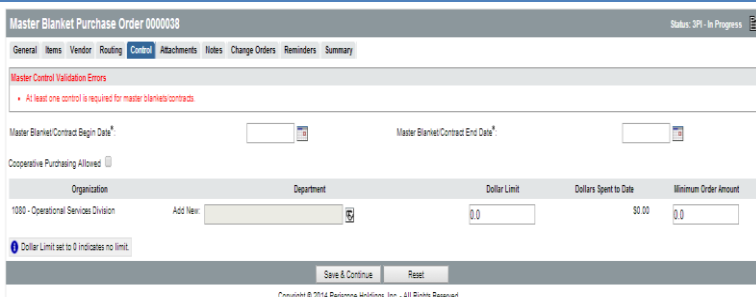
Search for all the Vendors on the contract and check the box next to the Vendor's name. You can do this process one at a time and click Save & Continue.

Click Save & Exit once complete

## Job Aid:

### How to Set Up a Master Blanket from Scratch

#### Screenshot



Master Blanket Purchase Order 0000008 Status: SP - In Progress

General Items Vendor Routing **Control** Attachments Notes Change Orders Reminders Summary

**Master Control Validation Errors**

- At least one control is required for master blanket contracts.

Master Blanket Contract Begin Date:  Master Blanket Contract End Date:

Cooperative Purchasing Allowed: ☐

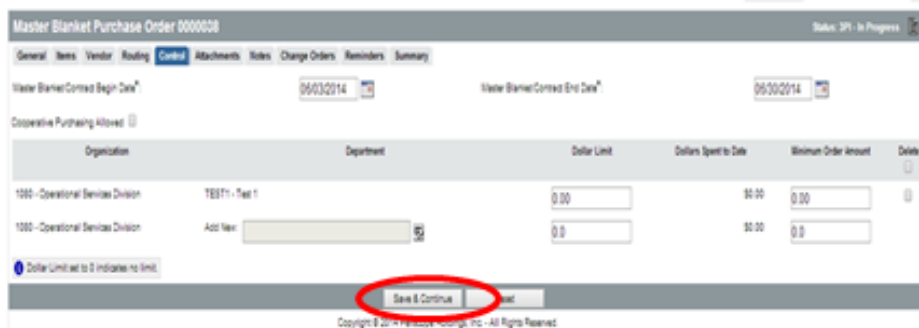
Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount
1000 - Operational Services Division	Add New	\$0.00	\$0.00	\$0.00

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

16. On the Control tab enter the Master Blanket Contract Begin and End Date. You must use the calendar icons to select the Begin and End date.

Select the Organization(s) and Department(s) who can view and utilize this contract in COMMBUYS.

Click Save & Continue



Master Blanket Purchase Order 0000008 Status: SP - In Progress

General Items Vendor Routing **Control** Attachments Notes Change Orders Reminders Summary

Master Blanket Contract Begin Date: 06/03/2014 Master Blanket Contract End Date: 06/03/2014

Cooperative Purchasing Allowed: ☒

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount	Details
1000 - Operational Services Division	TEST1 - Test 1	\$0.00	\$0.00	\$0.00	<input type="button" value="Edit"/>
1000 - Operational Services Division	Add New	\$0.00	\$0.00	\$0.00	<input type="button" value="Add"/>

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

17. This is a view of a completed control tab

If all organization in COMMBUYS can purchase from the MBPO, check the cooperative purchasing box and in the organization search for / select ALL ORGs

If you are the only organization to use this MBPO, select the department(s) by clicking on the eyeglasses to search for the organization and department. You will have to select each department if all users in your COMMBUYS organization use this MBPO.

You can also set a dollar limit or minimum order amount if the contract has dollar stipulations.

Click Save & Continue